

News, current issues

- News** Fewer people are paying for private healthcare >>
- News** Everyone in the health sector is in uncertainty - Interview with Lajos Fábian >>
- News** The categorisation - and pay - of healthcare workers has become a contentious issue >>

Macro approach to financing healthcare and medicinal products

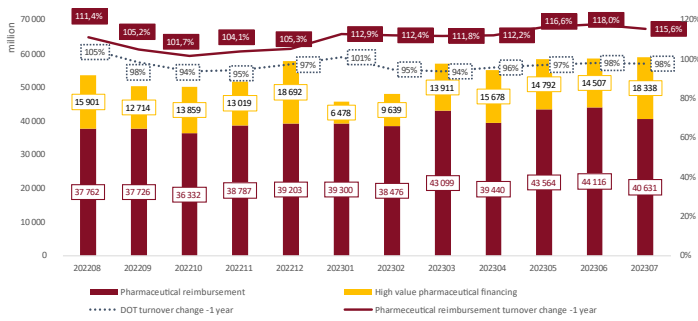
Balance of the Health Insurance Fund, July 2023

Standard	6 633 M	-7,5%
Indication based reimb.	13 548 M	-5%
Indication based 100% reimb.	16 875 M	-9,9%
NPP	3 575 M	-9,8%
Pharmacy	40 631 M	-7,9%
High value	18 337 M	26,4%
Total	58 969 M	0,6%

Source: Healthware analysis based on NHIFA data

Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



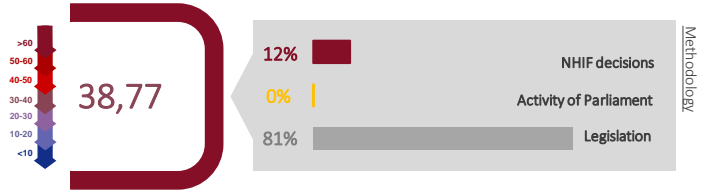
Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, July 2023

Explanation	Number of authorized products	Applications for reimbursement	Number of reimbursed products
Originator	1	6	1
First generic	2	3	1

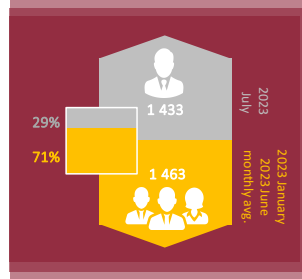
Source: Healthware analysis based on NHIFA data

Decision-making index, July 2023



Methodology

Average number of medical sales reps



Share of doctors and others

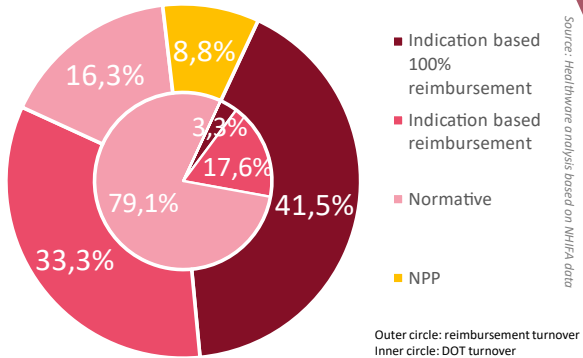
Source: NHIFA data, Healthware analysis

Deviation from the target

5 648 M	
284 104 M	83 503 M
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

* The value of social welfare prescriptions is shown under the relevant title

Product offering

Legislation follow up

In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information in this complex legal environment.

In the framework of regulatory compliance service, immediate alerts may be sent in the form of e-mails about the relevant legal changes along with

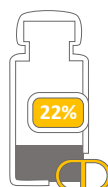
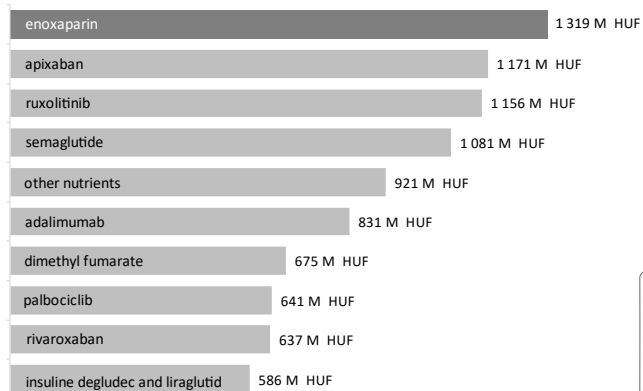
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



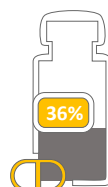
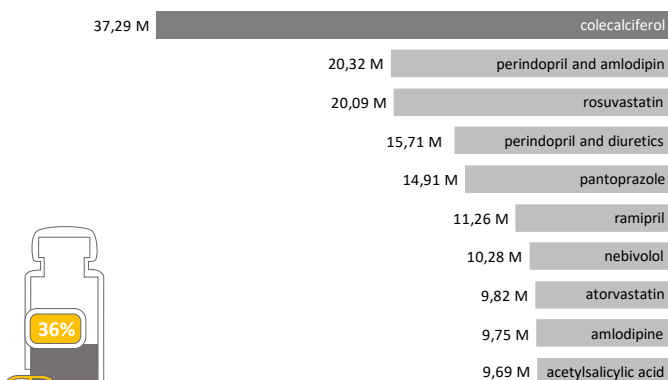
Toplists of reimbursement and number of patients, July 2023

TOP 10 ATCs by all reimbursement paid



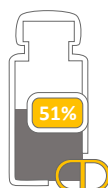
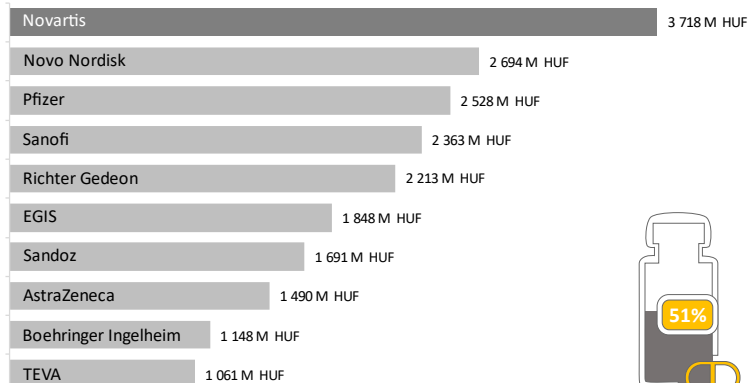
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



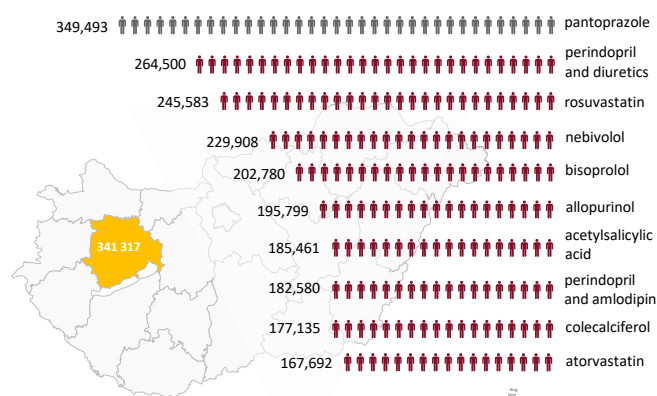
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

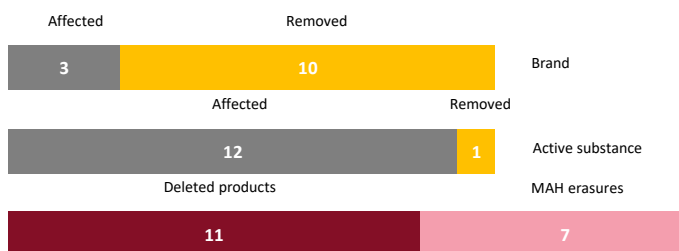
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, July 2023

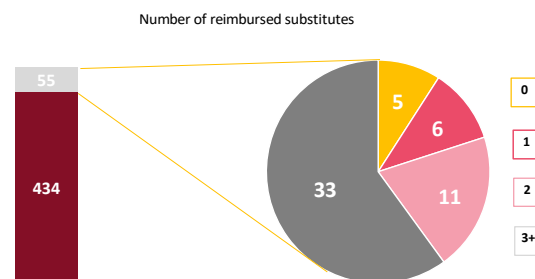
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether there remained (affected) at least one product that belonged to the active substance or brand.



Source: Pharmacy turnover data, Healthware analysis

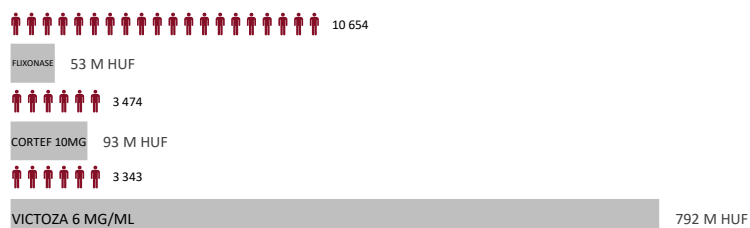
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 434 products had been on the list before July 2023, compared to 55 new product added to the list in the month under review. The 55 newly listed products were grouped according to the number of reimbursed substitutes. Based on this criterion, 4 groups were formed: products with 3 or more, exactly 2, exactly 1 and 0 reimbursed substitutes.



Source: Pharmacy turnover data, Healthware analysis

Turnover data for preparations without a substitute, July 2023



*Turnover in the 12 months preceding the product shortage
Source: Pharmacy turnover data, Healthware analysis

Highest growth, July 2023 vs. June 2023 in HUF

Company	Brand	Reimbursement increment	%*
1. HEALTHCARE CELLTRION	YUFLYMA	295 760 881 HUF	1176%
2. STADA	THIOGAMMA	173 199 511 HUF	138%
3. STADA	LENALIDOMIDE STADA	47 954 664 HUF	-**
4. VIATRIS	CARDURA	44 810 807 HUF	172%
5. ZENTIVA	THIOCTIC ACID ZENTIVA	29 874 098 HUF	245%
6. Boehringer Ingelheim	OFEV	28 648 579 HUF	117%
7. Leadiant Biosciences	CHENODEOXYCHOLIC ACID LEADIANT	21 429 618 HUF	185%
8. SANDOZ & Novartis Division	ERELZI	20 188 975 HUF	393%
9. KRKA	EPLERENON KRKA	18 974 372 HUF	202%
10. ucb	FINTEPLA	18 896 637 HUF	167%

*Compared to the average of the 6 months preceding the reference month
** No reimbursement outflow in the last 6 months
Source: Pharmacy turnover data, Healthware analysis